

FM014-Procurement Request Change Order Screen

Introduction

This procedure describes the process to enter a purchase request amendment in CSPS. The purchase request modification data is entered via the CSPS "Purchase Request Change Order Screen" (FM014).

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
TRANS:					
NO	This field indicates the system generated number which identifies the amended requisition transaction.	Derived	System generated	Y	N
DATE	This field indicates the date of the transaction. It defaults to the current date and cannot be overwritten. The required format is DD-MON-YYYY, e.g., 31-MAY-1999	Derived	System generated	N	N

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
FEDSTRIP	This field is a pop-up screen which contains information pertaining to Fedstrip transactions.	Derived	System generated	N	N
DOC:					
TYPE	This field lists the document types of the original requisitions (e.g., POREQ)	Required. This field contains an LOV.	Valid values are maintained in GL021	Y	N
NO	<p>This field lists the number of the original requisition which is undergoing the modification.</p> <p>The first section is the document number, the middle section is the release number and the last section indicates a modification number, if one exists.</p>	Required. This field contains an LOV.	System generated from FM030	Y	Block 2 on CD-435
DATE	This field lists the date of the original on-line request. It is automatically populated from the original requisition.	Derived	System generated	Y	Y
NOTES	This is a 240-character pop-up field used to record notes or comments about the modification.	Optional. Double click to access the pop-up.	Entered by user	N	N
NTE \$ CURRENT	This functionality is not currently used.	N/A	N/A	N/A	N/A
NTE \$ REVISED	This functionality is not currently used.	N/A	N/A	N/A	N/A
TOTAL \$ CURRENT	This field lists the original amount of the requisition before the modification.	Derived	System generated	N	N
TOTAL \$ REVISED	This field lists the new amount of the requisition as a result of the modification. It is automatically calculated based on the revised quantity and the revised unit price.	Derived	System generated	N	N

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
DIFFERENCE	This field lists the dollar difference between the current and revised totals.	Derived	System generated	N	N
APPROVED:					
APPROVED	<p>This radio button indicates whether a commitment is complete and ready for approval routing. Valid values are "Y" for yes or "N" for no. When "Y" is entered, the name of the approver and the current date is displayed in the adjacent fields.</p> <p>The system checks funds availability at the MDL level within each line item. Only MDL's with sufficient funds will be posted to the general ledger accounts upon approval. Using insufficient funds generates an error message.</p> <p>Note: Once the Approved radio button is clicked, the name of the creator of the modification appears.</p>	Required	Entered by user	N	N
DATE	This field lists the date of approval. It defaults to the system date when the approval flag is set to "Y".	Derived	System generated	N	N
ROUTING	<p>This field is a pop-up field used to view the individuals who need to approve the modification. Once all approvers have approved the changer order, it is considered final.</p> <p>Note: This field will only contain data after the Approved radio button has been selected.</p>	Derived	System generated from WF001	N	N
LINE ITEM #	This field lists the original purchase request line item number. It is automatically populated from the original requisition and cannot be overridden.	Derived	System generated	N	Block 5 on CD-435

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
FEDSTRIP	This field is a pop-up screen which contains information pertaining to Fedstrip transactions.	Derived	System generated	N	N
DESCR	This field defaults to "Y" when data has been entered into the revised description field.	Derived	System generated	N	N
CURRENT:					
CURRENT	This field is a pop-up which displays the original purchase request's line item description.	Derived	System generated from FM030	N	N
QUANTITY	This field displays the current quantity requested for the line item.	Derived	System generated from FM030	N	N
UNIT PRICE	This field displays the current unit price for the line item.	Derived	System generated from FM030	N	N
ITEM TOTAL \$	This field displays the current total for the line item.	Derived	System generated from FM030	N	N
REVISED:					
REVISED	<p>This is a pop-up field used to record the revised description for the line item.</p> <p>If no change is made, the original description will remain as a default.</p>	Optional	Entered by user	N	Block 6 on CD-435
QUANTITY	<p>This field lists the new total quantity for this item. If the original requisition was for 10 units, and the new amount is five more, enter 15 in the quantity field.</p> <p>If no change is made, the original quantity will remain as a default.</p>	Optional	Entered by user	N	Block 8 on CD-435

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
UNIT PRICE	This field lists the new unit price for this item. If the original requisition was for \$10, and the new amount is five more, enter \$15 in the unit price field. If no change is made, the original amount will remain as a default.	Optional	Entered by user	N	Block 10 on CD-435
ITEM TOTAL \$	This field lists the new total price for this item. If no change is made, the original item total will remain.	Optional	System generated	N	Block 11 on CD-435
MDL #	The multiple distribution line number for the corresponding line item.	Derived	System generated	N	Block 17 on CD-435
CURRENT:					
%	The current percentage of the MDL which is allocated to the corresponding ACCS (Accounting classification code structure).	Derived	System generated from FM030	N	N
QUANTITY	The current quantity of the line item broken down by the MDL which is allocated to the corresponding ACCS.	Derived	System generated from FM030	N	N
ACCS	This is a pop-up field used to display the current account classification code.	Derived	System generated from FM030	N	N
FUNDS AVAIL	This field displays a "Y" to indicate that there were available funds to approve the original requisition.	Derived	System generated from FM030	N	N
OVERRIDE	This field displays a "Y" to indicate that the original requisition did not have available funds and was sent to the override official.	Derived	System generated	N	N
MDL TOTAL \$	This field lists the total dollar amount for all MDLs.	Derived	System generated from FM030	N	N
REVISED:					

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
%	<p>This field is used to record the new percentage break down for the MDL. This new percentage amount will be redistributed and reflected in the "Quantity" field.</p> <p>If no change is made, the original percentage will remain as a default.</p>	Optional	Entered by user	N	Block 20 on CD-435
QUANTITY	<p>This field is used to record a new quantity. It will automatically reflect new changes if the "%" field has been changed. Otherwise, a change in quantity will update the "%" field.</p> <p>If no change is made, the original quantity will remain as a default.</p>	Optional	Entered by user	N	N
ACCS	<p>This field is a pop-up used to change the current ACCS. The project, organization, object class, and user defined field may all be changed.</p> <p>If no change is made, the original ACCS will remain as a default.</p>	Optional	Entered by user	N	Block 19 on CD-435
FUNDS AVAIL	This field displays a "Y" to indicate that there were available funds to approve the modification.	Derived	System generated	N	N
OVERRIDE	This field displays a "Y" to indicate that this modification did not have available funds and needed to be sent to the override official.	Derived	System generated	N	N
MDL TOTAL \$	<p>This field lists the new total price for this MDL.</p> <p>If no change is made the original amount will remain.</p>	Optional	System generated	N	Block 21 on CD-435
CUR ACCS	This field displays the current ACCS.	Derived	System generated	N	N

Field Name	Description	Attributes	Derivation Source	Query Field	Mapping
REV ACCS	This field displays the revised ACCS. Note: If no changes are made to the original ACCS, this field displays the current ACCS.	Derived	System generated	N	N
OK	Selecting this pushbutton will clear all data fields without saving any changes made. Note: Clicking this pushbutton will NOT save changes made to a document.	Pushbutton	N/A	N/A	N/A
CANCEL	Selecting this pushbutton will clear all data fields without saving any changes made.	Pushbutton	N/A	N/A	N/A